



State of Nevada – Department Of Personnel

CLASS SPECIFICATION

<u>TITLE</u>	<u>GRADE</u>	<u>EEO-4</u>	<u>CODE</u>
RETIREMENT EXAMINER II	34	B	7.131
RETIREMENT EXAMINER I	32	B	7.120

SERIES CONCEPT

Retirement Examiners review member accounts to determine if member meets eligibility criteria and/or estimate retirement benefits by applying and interpreting eligibility criteria and applicable policies, rules and guidelines.

Incumbents process applications for service and disability retirement by reviewing application form and file for completeness, obtaining missing information, issuing written acknowledgement of application, consulting with medical community to assess applicants information, calculating benefit payment amounts, establishing record and preparing payment release forms.

Incumbents process survivor benefits including determining eligibility, verifying service credit, verifying relationship of claimant and determining effective date and benefit payable to each claimant, creating a file/record, calculating taxable portion of benefits and life expectancy of the recipient according to IRS code, and continually monitoring the account to ensure compliance with statute.

Incumbents provide group and/or individual counseling services regarding service and disability retirement, survivor benefits, service credit, social security offsets, purchase-of-service, repayment of withdrawn contributions and other retirement benefit matters.

Incumbents design presentations and programs such as pre-retirement programs to meet the needs of a specific target group, as well as comply with official policies and statutes.

Incumbents process requests for employment of disability recipients by reviewing medical information and specific position duties with physician, preparing and presenting report of analysis and recommendations. Monitors status of disability recipients who are employed to ensure their compliance with employment restrictions.

Incumbents research, compose, dictate and verify correspondence to members and employers regarding various retirement/benefit matters.

Incumbents perform related work as required.

CLASS CONCEPTS

RETIREMENT EXAMINER II

Under direction of the Division Chief, Retirement Examiner II's perform the full range of duties as described in the series concept and differ from the Retirement Examiner I in that incumbents perform activities under less direction and require greater public relations activities. Incumbents assigned to this level are expected 1) to supervise employees in the Benefits/Membership Division in the absence of the Division Chief or 2) independently perform the full range of operations required in a satellite office. Incumbents assigned to this level can be expected to perform special projects such as audits of employee pay factors. Positions assigned to this class are also expected to perform public relations activities such as instructional programs, employer visits and workshops or informational sessions.

RETIREMENT EXAMINER I

Under general supervision of the Division Chief, Retirement Examiner I's perform the duties described in the series concept at the journey level. It is distinguished from the Retirement Examiner II class in that work activities are performed under supervision and less public relations activities are involved in the nature of their work assignments.

MINIMUM QUALIFICATIONS

RETIREMENT EXAMINER II:

EDUCATION AND EXPERIENCE:

I

Graduation from high school and five years of office/clerical experience involving public interaction, records maintenance and interpreting and applying rules and regulations; OR

II

One year experience as a Retirement Examiner I in Nevada State service; OR

III

An equivalent combination of education and experience.

FULL PERFORMANCE KNOWLEDGE, SKILLS AND ABILITIES: (These may be acquired on the job and/or are needed to perform the work assigned.)

Knowledge of common investment and returns available to individuals.

MINIMUM QUALIFICATIONS (Cont.)

FULL PERFORMANCE KNOWLEDGE, SKILLS AND ABILITIES: (Cont.)

Skill in effectively communicating with other people sufficient to provide consultative services regarding retirement options, etc.

ENTRY LEVEL KNOWLEDGE, SKILLS AND ABILITIES: (Applicants will be screened for possession of these through written, oral, performance or other evaluation procedures.)

General knowledge of the concepts of a benefit program as applied to determining eligibility and calculating benefits. General knowledge of interviewing techniques in order to attain necessary information. Knowledge of all PERS programs, policies and procedures. Knowledge of Federal and State laws, rules and regulations applicable to programs.

Skill in written English sufficient to compose routine business correspondence to benefit recipients. Skill in basic mathematical computation sufficient to calculate benefit amounts by applying established formulas.

RETIREMENT EXAMINER I:

EDUCATION AND EXPERIENCE:

I

Graduation from high school and three years of office/clerical experience involving public interaction, records maintenance and interpreting and applying rules and regulations; OR

II

One year of experience as a Retirement Technician in Nevada State service; OR

III

An equivalent combination of education and experience.

FULL PERFORMANCE KNOWLEDGE, SKILLS AND ABILITIES: (These may be acquired on the job and/or are needed to perform the work assigned.)

Knowledge of all PERS programs, policies and procedures. Knowledge of Federal and State laws, rules and regulations applicable to programs.

MINIMUM QUALIFICATIONS (Cont.)

ENTRY LEVEL KNOWLEDGE, SKILLS AND ABILITIES: (Applicants will be screened for possession of these through written, oral, performance or other evaluation procedures.)

General knowledge of the concepts of a benefit program as applied to determining eligibility and calculating benefits. General knowledge of interviewing techniques in order to attain necessary information. Knowledge of standard office practices and procedures.

Skill in written English sufficient to compose routine business correspondence to benefit recipients. Skill in basic mathematical computation sufficient to calculate benefit amounts by applying established formulas.

This class specification is used for classification, recruitment and examination purposes. It is not to be considered a substitute for work performance standards for positions assigned to this class.

	<u>7.131</u>	<u>7.120</u>
ESTABLISHED:	05/18/78	07/01/74
REVISED:	07/01/93P	03/21/78-3
	09/24/92PC	09/22/89R
		03/13/90PC
REVISED:		07/01/93P
		09/24/92PC